# 2023 Form 6 - Full and Public Disclosure of Financial Interests

**Filed with COE: 03/21/2024**

## General Information

Name: Hon Robert R Wheeler

**CONFIDENTIAL**

**PID 36352**

### AGENCY INFORMATION

| Organization | Suborganization | Title |
|---|---|---|
| Judicial Circuit (2Nd) | Elected Constitutional Officer | |

### CANDIDATE FOR

| Position | Agency Name | Position sought or held |
|---|---|---|
| Circuit Judge | 2nd Judicial Circuit | Circuit Judge, Group 7 |

## Net Worth

My Net Worth as of December 31, 2023 was $ 2,551,289.20.

## Assets

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds $1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effect is $ 100,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

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| Description of Asset | Value of Asset |
|---|---|
| {REDACTED}Residence | $ 400,000.00 |
| Georgia Farm | $ 150,000.00 |
| Merrill Lynch Joint CMA Reserve Account - Cash | $ 24,958.75 |
| Stock - Automatic Data Processing | $ 51,253.40 |
| Stock - CVS Health Corp | $ 16,581.60 |
| Stock - Johnson and Johnson Com | $ 62,696.00 |
| Stock - Abbott Labs | $ 11,007.00 |
| Stock - Alphabet Inc CL A | $ 19,556.60 |
| Stock - Amazon Inc | $ 15,194.00 |
| Stock - Dover Corp | $ 15,381.00 |
| Stock - General Dynamics | $ 12,983.50 |
| Stock - JP Morgan Chase | $ 8,505.00 |
| Stock - Novartis | $ 10,097.00 |
| Stock - RTX Corp | $ 13,967.24 |
| Stock - Shell PLC | $ 6,580.00 |
| Stock - United Parcel | $ 6,760.89 |
| Merrill Lynch IRA Reserve Account - Cash | $ 102,722.43 |
| Merrill Lynch IRA Investment Account - Cash | $ 4,290.28 |
| Stock - Caterpillar Inc | $ 29,567.00 |
| Stock - Disney Co | $ 18,058.00 |
| Stock - Emerson Elec | $ 38,932.00 |
| Stock - McDonalds Corp | $ 59,302.00 |
| Stock - Nextera Energy | $ 24,296.00 |
| Stock - Pfizer Inc | $ 2,879.00 |
| Stock - Procter & Gamble Co | $ 14,654.00 |
| Stock - Stryker Corp | $ 209,622.00 |
| Merrill Lynch Edge Joint Account - Cash | $ 16,395.10 |
| Vanguard 500 Index Admiral Mutual Fund | $ 26,986.79 |
| Vanguard Balanced Index Admiral Mutual Fund | $ 35,645.01 |

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| Description of Asset | Value of Asset |
|---|---|
| Vanguard High Dividend Yield Index Admiral Mutual Fund | $ 39,341.39 |
| Vanguard Real Estate Index Admiral Mutual Fund | $ 31,142.20 |
| Vanguard Small Cap Index Admiral Mutual Fund | $ 16,447.58 |
| Vanguard Total Bond Market Index Admiral Mutual Fund | $ 20,143.78 |
| Vanguard Total Intl Stock Index Admiral Mutual Fund | $ 33,581.46 |
| Vanguard Total Stock Market Index Admiral Mutual Fund | $ 43,316.92 |
| Vanguard Wellesley Income Mutual Fund | $ 29,318.45 |
| Vanguard Consumer Discretionary ETF | $ 9,745.60 |
| Vanguard Growth ETF | $ 10,880.80 |
| Vanguard Information Technology ETF | $ 12,100.00 |
| Fidelity Government Money Market - Cash | $ 118,028.05 |
| Stock - Apple Inc | $ 46,207.20 |
| Stock - Amazon Inc | $ 15,194.00 |
| Stock - Alibaba Group | $ 3,875.50 |
| Stock - Caterpillar Inc | $ 14,783.50 |
| Stock - Costco | $ 16,502.00 |
| Stock - Salesforce Inc | $ 8,946.76 |
| Stock - Chevron | $ 14,916.00 |
| Stock - Elevance Health | $ 11,789.00 |
| Fidelity Equity Income Mutual Fund | $ 11,629.29 |
| Fidelity Nasdaq Mutual Fund | $ 10,990.48 |
| Fidelity Select Defense Mutual Fund | $ 10,318.48 |
| Fidelity Select Semiconductors Mutual Fund | $ 15,267.51 |
| Fidelity Select Med Tech Mutual Fund | $ 24,354.18 |
| Fidelity Select Health Care Mutual Fund | $ 24,306.40 |
| Fidelity Select MSCI Information Mutual Fund | $ 11,491.20 |
| Fidelity Select 500 Index Mutual Fund | $ 11,931.33 |
| Stock - Alphabet Inc CL A | $ 16,762.80 |
| Stock - Honeywell Intl | $ 12,582.60 |

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| Description of Asset | Value of Asset |
|---|---|
| Stock - Illinois Tool Works | $ 13,097.00 |
| Stock - Jabil Inc | $ 19,110.00 |
| Stock - KLA Corp | $ 14,532.50 |
| Stock - Lockheed Martin | $ 9,064.80 |
| Stock - Mastercard | $ 8,530.20 |
| Stock - Merck | $ 10,902.00 |
| Stock - Microsoft | $ 37,604.00 |
| Stock - Nvidia | $ 36,617.60 |
| Stock - Dominion Energy | $ 6,580.00 |
| Stock - Paychex | $ 11,911.00 |
| Stock - Pepsico | $ 16,984.00 |
| Stock - Paypal | $ 6,141.00 |
| Stock - Southern Co | $ 14,024.00 |
| Stock - Taiwan Semiconductor | $ 6,240.00 |
| Stock - AT&T | $ 10,907.00 |
| Stcok - US Bancorp | $ 8,656.00 |
| Stock - Verizon | $ 3,770.00 |
| Stock - Walmart Inc | $ 7,882.50 |
| Stock - Exxon Mobil | $ 12,997.40 |
| Stock - Zoetis | $ 9,868.50 |
| CD - Bank of Baroda | $ 49,999.50 |
| CD - JP Morgan Chase Bank | $ 50,018.50 |
| Stock - Cisco | $ 10,104.00 |
| Stock - General Electric | $ 7,657.00 |
| Stock - Intuitive Surgical | $ 6,747.20 |
| Stock - Microsoft Corp | $ 9,401.00 |
| Stock - Shopify | $ 7,790.00 |
| CD - Kearney Bank New Jersey | $ 10,000.30 |

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## Liabilities

LIABILITIES IN EXCESS OF $1,000:

| Name of Creditor | Address of Creditor | Amount of Liability |
|---|---|---|
| Northwest Federal Credit Union | P.O. Box 1229, Herndon, VA 20172-1229 | $ 26,831.53 |

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

| Name of Creditor | Address of Creditor | Amount of Liability |
|---|---|---|
| N/A | | |

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## Income

Identify each separate source and amount of income which exceeded $1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2023 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☐ I elect to file a copy of my 2023 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

| Name of Source of Income Exceeding $1,000 | Address of Source of Income | Amount |
|---|---|---|
| State of Florida | 200 E Gaines Street, Tallahassee, FL 32309 | $ 166,411.02 |
| Fidelity Government Money Market Dividend | 499 Washington Blvd, Jersey City, NJ 07310 | $ 5,379.83 |
| Vanguard Real Estate Index Mutual Fund Dividend | P.O Box 982901, El Paso, TX 79998-2901 | $ 1,232.00 |
| Vanguard Total International Mutual Fund Dividend | P.O. Box 982901, El Paso, TX 79998-2901 | $ 1,078.00 |
| Vanguard High Dividend Mutual Fund Dividend | P.O. Box 982901, El Paso, TX 79998-2901 | $ 1,219.00 |
| Johnson and Johnson Dividend | New Brunswick, New Jersey | $ 1,905.00 |
| Stryker Corp Dividend | Kalamazoo, Michigan | $ 2,241.00 |
| McDonalds Corp | Chicago, Illinois | $ 1,337.00 |
| Automatic Data Processing | Roseland, New Jersey | $ 1,232.00 |
| Bank of Baroda | New York, New York | $ 2,675.00 |
| JP Morgan Chase | New York, New York | $ 2,700.00 |

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

| Name of Business Entity | Name of Major Sources of Business' Income | Address of Source | Principal Business Activity of Source |
|---|---|---|---|
| N/A | | | |

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## Interests in Specified Businesses

| Business Entity # 1 |
| --- |
| N/A |

## Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

## Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

***Robert R Wheeler***

Digitally signed: **03/21/2024**

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